

Automation of AFO Reports using SAP Business Objects Business Intelligence Platform

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Abstract

SAP Analysis for Office (AFO) Reports are widely used as a preferred choice of reporting solution implemented specially for the Financial Accounting Business users. Companies are required to produce Financial Results for the SEC filings every quarter and it is a very time sensitive process. SAP Business Objects platform provides tools to automate the reports and produce the results as per the desired parameters and also provides various options for their distributions. This helps in saving time and efforts for Business users in running these reports. This paper discusses the options provided by SAP Business Objects BI platform for the AFO Reports automation.

Keywords: SAP S/4 HANA, Business Objects, SAP BOBJ, AFO Reports, Automation.

1 Introduction:

The BI platform is a flexible solution for delivering information to users, in many forms including dashboards and interactive reports, via any web application. The platform gives real benefits extending across and beyond the organization, as an integrated suite for reporting, analysis, and information delivery. The BI platform gives all the tools that you need to publish securely, distribute, and administer your business intelligence, increasing end-user productivity and reducing administrative efforts. For example, it is used to distribute daily financial report runs to provide updated results for corporate accounting users.

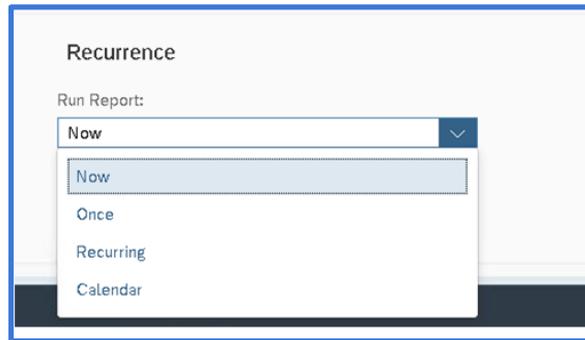
2 Saving AFO Reports on BI Platform:

AFO workbooks can be saved on the Business intelligence platform, on a SAP BW platform, on a SAP Analytics Cloud platform or as a local file. As a prerequisite for the scheduling, we need to save AFO Reports on the Business intelligence platform. Following are the key steps:

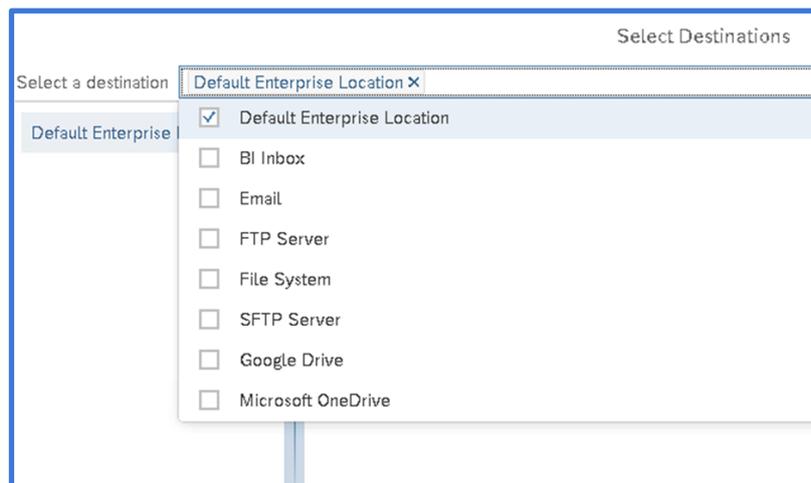
- Choose File -> Analysis -> Save Workbook - If all platforms are enabled in your Analysis installation, you will find several icons for saving a workbook, one for each platform.
- Log on to the Business intelligence platform - Your SAP Basis Administrator should be able to provide you with the login details.
- Select the location where you want to save the workbook.
- Enter a name and technical name for the workbook.
- Press Save. The workbook is now saved to the Business intelligence platform.

3 Scheduling Reports-Deep dive:

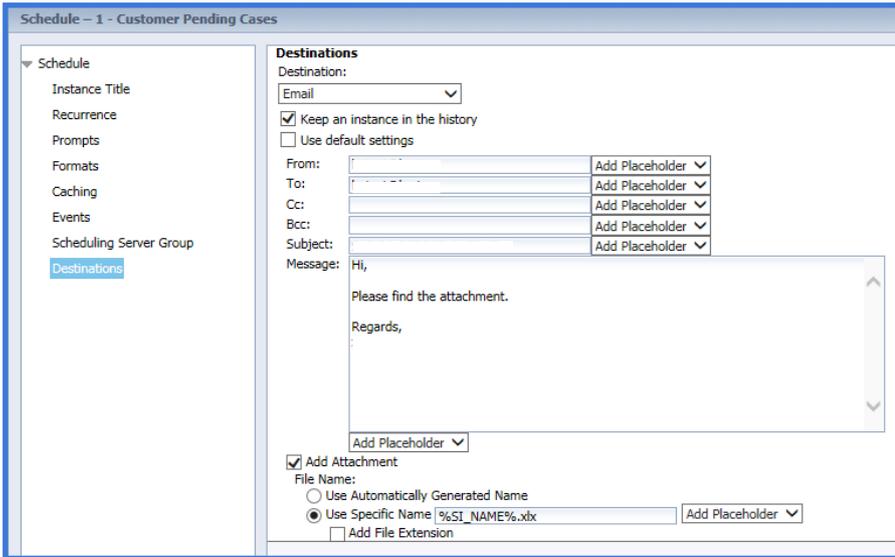
Now we will discuss the details of the Scheduling of AFO Workbooks and the options available for Scheduling.



Recurrence: Following options are available as shown in the picture. 'Now' option runs the object one time, starting immediately. 'Once' option runs the object once, at the specified start time. 'Recurring' option has sub-options like Hourly, Daily, Weekly, Monthly, Specific Day of a Month, 1st Monday of the Month, X Day of Nth Week of the Month, Business Hours, and Last day of the Month. 'Calendar' option Creates an instance on each calendar date you specify, at the specified start time.

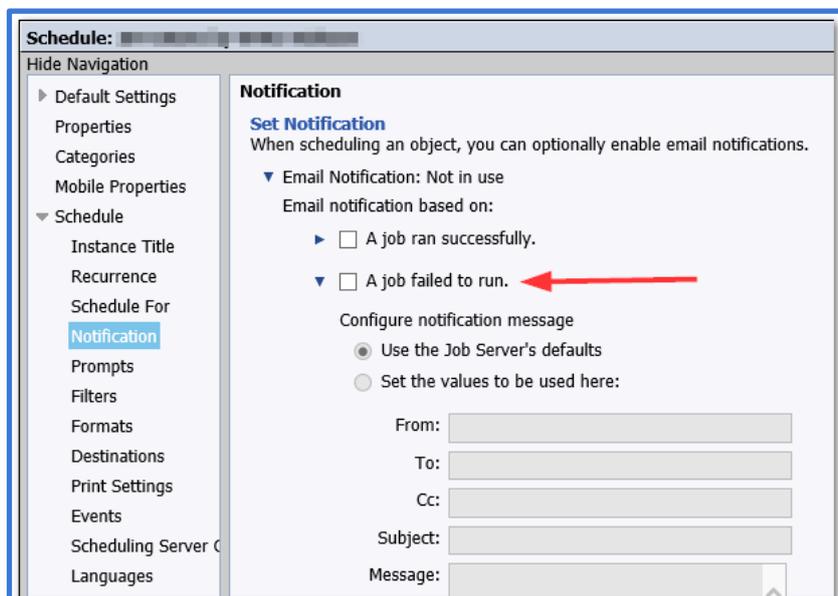


Destinations: The option to choose a destination gives you the flexibility to deliver instances across your system or to destinations outside your BI platform. When the system runs an object, it stores the output instance on the output File Repository Server (FRS) by default. BI Inbox is the user Inbox in the Business object system. Email is generally used as the preferred method where users do not have to log into any system to receive the information. Additionally, by maintaining the rules for the emails and writing basic scripts, can help users automate the email delivered information to be absorbed in their processes. FTP server location can be used if you would like to configure the server or a team sharepoint location for the reports to be delivered. A file system option can be utilized where a shared drive location on the company network is used for the distribution of the reports. Additionally, options like Google Drive and Microsoft OneDrive are also available.

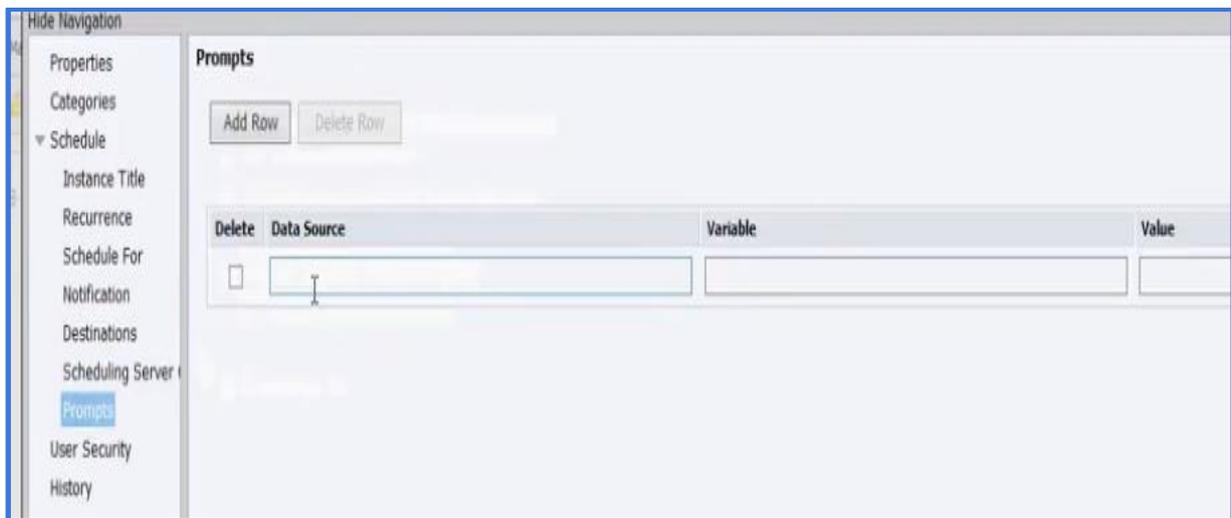


Here is an example of the email scheduling option. Email details like, email address fields, Subject and email body along with the attachment details can be defined. System Variables like SI_NAME can be used to dynamically populate filename.

Notifications: The notification setting allows SAP support team members to set notifications options for jobs failures or success. This feature helps in monitoring the jobs and also helps teams to take action on the failed jobs.



Prompts: When a document is scheduled, prompts can have static values and are specified when creating the job. For SAP Business Explorer (SAP BEx) queries, SAP HANA queries or universe prompt parameters, it is possible to fill prompts dynamically using default values. An easy way to fill this screen is to create a variant on the AFO workbook. Once a variant is created for the report, it can be utilized to fill out the prompt details shown in the screen.

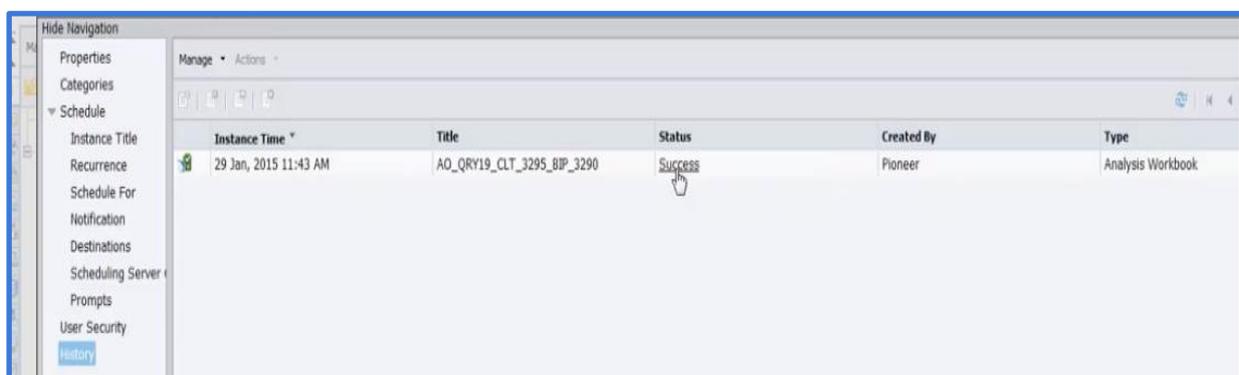


The Key steps involved in the scheduling process are listed as below:

- Log in to SAP Business Objects BI Launchpad platform
- Locate your workbook in the Folders or Favorites section
- Right-click on the workbook and select the "Schedule" option from the context menu
- In the scheduling interface, Specify the destination where the scheduled file should be delivered (e.g., email, file system, BI Inbox)
- Click the "Recurrence" tab to define when and how often the workbook should run (e.g., daily, weekly, monthly)
- Configure the start and end times for the schedule
- Configure Success or Failure Notifications if required
- If your workbook requires input parameters, set them in the "Prompts" section
- Click "Schedule" to save and activate the schedule.

4 Instance History:

BI platform creates instances from objects; for example, a report instance is created when you schedule a report object to run and finish successfully. A report instance is a report object that includes specific report data; the report data can be retrieved from one or more data sources. Each instance includes data that is current at the time the report is processed. You can view the instances either by opening the History dialog box for a workbook or using the BI platform Instance Manager. You can reschedule the job as well from the report's instance history by using the right click context menu.



The Instance Manager lets you view and manage all instances in the BI platform. You can use the Instance Manager for the following:

- Find specific instances.
- Select several instances and do batch operations on them (for example, pause, resume, or delete them).
- View detailed information for a single instance.

You can specify the search criteria, and then click Find. Only instances that meet all the criteria will be displayed.

Conclusion:

The Scheduling feature of SAP BusinessObjects (BOBJ) BI Platform allows SAP support teams to automate the execution of Analysis for Office (AFO) reports and workbooks. By predefining execution times, formats, destinations, and parameter values, users can schedule AFO reports to run at specific intervals or trigger events. Features like Failure notifications and Instance history tracking help the maintenance of scheduled jobs. Some of the key advantages to note as below:

- Automation of repetitive reporting tasks, freeing up valuable time for analysis rather than report generation.
- Scheduled reports can be directly shared with relevant stakeholders, enhancing communication and accessibility.
- Ensures timely availability of reports for decision-making during critical periods, such as month-end or year-end closures.
- Maintains a history of executed instances for transparency and audit purposes.

Hence, by leveraging the scheduling feature, corporate accounting teams can automate their financial reporting processes, enhance productivity, and focus on strategic financial analysis.

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